



Request for Proposal Narrative

The Request for Proposal Narrative is a written request for a vendor to demonstrate the functionalities of its software. Use this deliverable to request from a vendor to fill out a standard questionnaire and to demonstrate the functionalities of its software, on the basis of guidelines that were set by the project team. A vendor questionnaire, similar to the request for information (RFI), may be used instead of Business Scenarios, or as an addition to them.

I. IPT Name:		
II. Deliverable Name: Request for Proposal		Date Completed:
III. Contact Information		
	Name	Channel Unit
IPT Sponsor		
Channel Task Manager		
CIO Task Manager		
Contractor Task Manager		
IV. Task Order Number:		



Request for Proposal Narrative Sample

DATE

Mr./Ms.
Company
Address
City
State, Zip

Dear XXXX,

We have selected *VENDOR NAME* as one of *TOTAL # FINALISTS* vendors to provide *COMPANY NAME* with a proposal for *FUNCTIONAL AREA* software and associated services. As you may recall from our ongoing correspondence, *COMPANY NAME* is in the process of evaluating new *FUNCTIONAL AREA* solutions.

In this document you will find background information related to *COMPANY NAME*, as well as vendor proposal and presentation requirements. Your proposal must be received by *COMPANY NAME* on or before *DUE DATE*. A presentation of your software will be conducted during the week of *DATE*. A decision will be made in *MONTH*, and a contract will be finalized immediately thereafter. All vendors will be notified of our selection in writing once a final decision has been made.

A large portion of this Request For Proposal is dedicated to Business Scenarios. These scenarios describe situations that occur in the processing of *FUNCTIONAL AREA* software at *COMPANY NAME*. We realize that the Business Scenarios may require some additional explanation or interpretation from *COMPANY NAME*, to ensure that your responses are complete and accurate. If you have any questions, do not hesitate to contact *COMMUNICATION LIAISON* at (555) 555-1212.

Very truly yours,

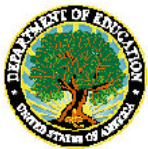
COMPANY NAME Software Selection Team



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1. INTRODUCTION

All material and information provided by COMPANY NAME shall be regarded as confidential information. Likewise, all materials contained within your formal proposal, as well as the materials and information distributed during the vendor presentations, will be treated confidentially. This information will, however, be made available to all project team members to assist in the evaluation process.

Software Selection Project Approach and Status

This Request For Proposal (RFP) represents one of several steps taken to provide COMPANY NAME with a software solution able to meet its business requirements and long-term objectives. In the first phase of the project, the software marketplace was screened based on the initial criteria established by COMPANY NAME. The result was a list of vendor candidates which met COMPANY NAME's core requirements.

In this phase of the project, the software selection scope has been narrowed to focus on the U.S. implementation. The RFI was critically evaluated based on this focused objective, and three vendors were recommended for further evaluation.

As one of the finalists, your firm has been requested to deliver a proposal and presentation to COMPANY NAME because our preliminary analysis indicates that your product may meet COMPANY NAME's business needs and objectives. This request does not represent a binding decision to purchase or lease any of your firm's software.

Responses to the RFP and Business Scenarios will provide the project with more detailed information to help further differentiate the vendor solutions. In addition to highlighting the best alternative for COMPANY NAME, this final evaluation will increase COMPANY NAME's confidence in, and understanding of, the product which will be implemented, and the effort required to perform the implementation.

Software Selection Schedule

In order to control the software selection process and allow equal opportunity for each candidate, the following guidelines must be followed without exception.

Your proposal must be received by COMPANY NAME on or before *DATE*. Please submit 5 copies of the proposal to:

COMMUNICATION LIAISON

COMPANY NAME

Address 1

Address 2

City, State Zip Code

As you know, a presentation of your software has been scheduled and will be conducted in late *MONTH*. The presentations will be held in *CITY, STATE* at a COMPANY NAME location. The exact location will be communicated to you via telephone in the near future. We plan to have two-day sessions with each vendor. The two-day format is necessary given the diverse interests of the audience



and the amount of information to be covered. The suggested agenda is presented on the following pages. Should you wish to reorder any of the topics or to add a topic, please contact *COMMUNICATION LIAISON* at (555) 555-1212 on or before *DATE* to discuss the modifications.

Vendor Presentation - Day 1 Agenda:

Topic	Time	Contents
Introductions	8:30-8:45	
Company Overview	8:45-9:15	Organization Headquarters and development locations Support locations
Future Directions	9:15-10:15	Next release functionality and time frame Client/server product offerings UNIX and multiple platform initiatives
Break	10:15-10:30	
Product Line Overview	10:30-12:00	Age and evolution of product line Current installations Functionality not covered by Business Scenarios
Business Scenarios	1:00-4:30	Business Scenario 1 - - Business Scenario 2 - - Business Scenario 3 - - Business Scenario 4 - -
Debriefing (No vendor participation required)	4:30-5:30	



Vendor Presentation - Day 2 Agenda:

Topic	Time	Contents
Recap	8:30-8:45	
Technical Review	8:45-10:00	DBMS architecture Client/server architecture Development Tools - Screen painter - Fourth generation language - Code generator Data Dictionary
Break	10:00-10:15	
Technical Review (continued)	10:30-12:00	Security Batch job management Remote printing and distribution Interfaces PC tools Integration - Spreadsheet package(s) - E-Mail - Word processor(s)
Business Scenarios (continued from Day 1)	12:00-2:30	Business Scenario 6 - - Business Scenario 7 - -
Other Applications	2:30-4:30	
Debriefing (No vendor participation required)	4:30-5:30	

All expenses incurred by the software vendor for the proposal and presentation are the responsibility of the vendor and will not be reimbursed by COMPANY NAME. All equipment necessary for the presentations will be supplied by the vendor, unless COMPANY NAME agrees to another arrangement.



2. COMPANY OVERVIEW

This section should discuss the background of the company. Topics that should be covered are at a minimum:

- Headquarters, other locations
- Revenue
- Number of employees
- Market/Industry information
- Organization Structure
- Annual Report (might be included in appendix)



3. PROJECT OVERVIEW

This section should discuss the objectives of the software selection project. Topics that should be covered are at a minimum:

- Scope of project
- History of problems sponsoring organization faces
- Description of current applications
- Target applications and technical platform
- Other initiatives related to selection currently in process
- Other relevant or unique information
- Include project organization chart



4. VENDOR QUESTIONNAIRE

General Information

Company Information

Indicate the date your company was founded.

Indicate whether it is a public or private corporation.

Indicate how many people are employed by your company, and how many are in the following areas:

Sales and Marketing
Development
Support and training
Consulting
Management

In which cities do you have support offices?

Indicate your companies sales revenue for the last five years.

Indicate the level of experience working in the _____ industry. (Provide customer names)

Indicate the product name, on which this response is based.

When was the product first introduced to the marketplace?

Indicate the current worldwide install base of your financial/human resource product line

All versions (break it down worldwide and U.S.-wide)

Most current release (break it down worldwide and U.S.-wide)

Installation and Support

What training courses are available to support your product line?

What locations have training available?

Indicate the documentation that is included with the product.

Vision

Please explain your company's vision and direction for enhancing your current product line as well as supporting new technology.



Please explain your company's plans for supporting the _____ industry.

Functionality

General

What modules are supported by your product line? Please indicate any future product availability dates.

Please explain how your products are integrated.

How many accounting periods does your product support?

Does your product support workflow and/or imaging? Please explain.

Reporting

What reporting tools are integrated with your package?

Explain the ad-hoc query tools integrated with your product.

What kind of drill-down functionality is integrated with reporting?

Technical

For each component of the application (client, server, host) indicate the following: (include releases as appropriate)

- Supported hardware platforms (indicate time frames of future platforms to be supported)
- Supported operating systems
- Supported transaction monitors
- Supported database management systems
- Supported user interfaces
- Supported development tools

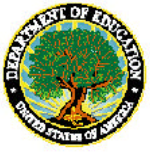
For network implementations indicate:

- Supported connectivity tools
- Supported network protocols

For performance considerations indicate:

- Range of scalability for hardware configuration
- Largest number of concurrent users supported today
- Largest master file and transaction databases (records and KBs)

Indicate the tools used to develop the product set.



**Department of Education
Student Financial Assistance**

What programming languages were used to write the product?

Indicate the tools that may be used to tailor the application.

Indicate the tools that are used for reporting and querying.



5. CRITICAL REQUIREMENTS

This section should contain information on any unique or stringent requirements the company might have. Some possible examples include:

- Chart of Accounts
 - Code Block layout
 - Extraordinary requirements
- Reporting needs
 - Regulatory
 - Management
- Consolidation
- Unique benefit requirements
- Payroll needs
- International Requirements
 - Language
 - Currency
 - Local tax requirements



6. BUSINESS SCENARIO INSTRUCTIONS

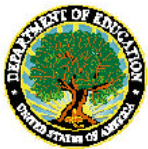
The software selection project team has developed a number of Business Scenarios that address unique or critical functional and technical requirements for the new application. These scenarios should be helpful to differentiate the vendors' product offerings and increase the confidence level of the project team that the chosen vendor will meet COMPANY NAME's needs.

The Business Scenarios are presented in the Appendix. For each scenario, include a *written response* in Section I of your proposal. A data flow diagram should also be attached if it illustrates the written response. Certain scenarios must also be demonstrated during your presentation. These scenarios are identified by a request to demonstrate, as opposed to a request to describe, how your software will satisfy the requirement. However, demonstration scenarios must also include written responses.

If you feel that a demonstration scenario cannot be performed within a reasonable amount of time, or that demonstrating one scenario precludes the ability to demonstrate another, please note this in your written response. In lieu of the demonstration, the written response must also include step-by-step instructions on how this scenario would be satisfied by the package.

Below is an inventory of the Business Scenarios. Demonstration scenarios are identified with an asterisk (*).

<u>Business Scenario 1 *</u>	<u>Business Scenario 2</u>	<u>Business Scenario 3 *</u>
<u>Business Scenario 4 *</u>	<u>Business Scenario 5</u>	<u>Business Scenario 6</u>



7. CONTRACTS AND ACCOUNT MANAGEMENT

Section II of your proposal should explain how you plan to support the COMPANY NAME account, should your firm be awarded the contract. This section should include, but does not have to be limited to, the following information:

- Terms and costs of the initial licensing agreement
- Terms and costs of subsequent site licensing agreements
- Description of the standard services your company provides to assist in ongoing support and maintenance of your product (e.g., account management, hot-line support, troubleshooting, trouble escalation, service/maintenance terms, and annual costs)
- Training services that your company can provide to assist COMPANY NAME in the implementation of your product (e.g., specialized expertise in report writers, other toolsets, specific applications, technical support, and installation support)
- Training facilities available to users, including course descriptions and duration, target audiences, and associated costs
- Resumes of representative personnel who could potentially support COMPANY NAME in the training efforts
- Terms and costs, per hour or per day, of training services.

COMPANY NAME maintains a set of terms and conditions which must be fulfilled by each vendor in order to be further considered in the evaluation process. This section of your proposal must identify all terms that *cannot* be fulfilled by your firm. These terms and conditions are:

- The product(s) must be provided to COMPANY NAME free of charge for a trial period of no less than 45 days, during which the software will be tested and the final contract negotiated.
- The vendor must be willing to provide documented "benchmark" data on the code block size, chart of accounts, hardware platform, number of processed transactions, and response time for high-volume processing sites that utilize the current version of the software.
- The annual support and maintenance costs for the identified products must be fixed for no less than a 3 year period upon receipt of the products.
- The contractual agreement can be canceled if COMPANY NAME is not fully satisfied that the product(s) meets specifications claimed by the vendor.

Your proposal should also include a copy of your firm's standard legal contract, as well as implementation and training documentation (with non-disclosure statements).



8. ADDITIONAL INFORMATION

Customer References

A proven track record is an important factor in COMPANY NAME's selection process of a software vendor. Therefore, Section III of your proposal should include a list of companies that have implemented the current version of your software. Similarity to COMPANY NAME's size, transaction volume, technical and functional requirements, and approach is desired and would enhance COMPANY NAME's confidence in your product's capabilities. For each company, include the name, position, and phone number of key technical and functional individuals using the packaged software. These individuals will be contacted by members of the software selection team in early *MONTH*.

Financial Statements

COMPANY NAME is also convinced that financial stability is an essential component of a long-term relationship with a software provider. By supplying COMPANY NAME with copies of your Annual Report, you will substantiate COMPANY NAME's understanding of your firm's financial position, as well as provide insight into your firm's product and service offerings.

Consulting Support

Installing your package and developing a prototype model will require assistance from your consultants. What kinds of consulting support do you provide? What are the qualifications of these consultants? Please provide resumes and billing rates.

Package Extensions

Upon evaluation, we may discover some necessary extensions to your package. What is your philosophy on making modifications / extensions? What kind of time / cost estimates can you provide? What are the qualifications of the members of your development team? Please provide resumes and billing rates.

The direction you plan to take with your product in the future will be an important consideration in making our decision. Please include a list of features you anticipate in future releases and associated target dates. Are there extensions that some of your customers requested, but that you declined to provide?

Supplier Feedback

COMPANY NAME requests supplier feedback regarding this RFP document and process. Please highlight areas for improvement as well as those areas that were exceptional. For example, if any part of the RFP was difficult to deliver, or put your firm at a disadvantage, please provide those details so that we might consider them in refining our procurement and RFP processes.



**APPENDIX
(BUSINESS SCENARIOS)**